

Early Childhood Education and Assistance Program

ECEAP Management System Training Manual



September 2009

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SECTION I

Introduction – The ECEAP Management System

The ECEAP Management System (EMS) is a comprehensive database which tracks child and program information and demographics. DEL ECEAP staff use the EMS data to monitor contractor compliance with the ECEAP Performance Standards and Contract.

Information collected in the EMS is often requested by state and national researchers studying state pre-kindergarten programs, or state lawmakers who use this data to make funding decisions.

Contractors use EMS reports to track program requirements, and to compile program data for local planning.

The ECEAP Management System has five main sections:

- 1. Contractor Information
- 2. Subcontractor Information
- 3. Program Information
- 4. Monthly Reports
- 5. Child Enrollment

EMS data is kept secure and no identifying information is released. It is very important that contractors monitor their EMS data for accuracy, since important decisions are based on the data.

SECTION II

Getting Started

1. Logging On

Contact the DEL ECEAP staff at (360)725-2839 or e-mail 'ECEAP@del.wa.gov' for information on installing the EMS system software, and obtaining your User ID and Password. Only staff designated by an ECEAP director may have access to the ECEAP Management System.

Once the "eceapclient" application is loaded on to your computer, add the "teddy bear" shortcut to your desktop.



Double click the shortcut, and enter your User ID and password.



ECEAP Management System Logon Screen

2. Options

Once you are logged in, you can select your EMS options by clicking on "Options" on the menu bar (see graphic next page).

- Place a check next to the Full Screen Mode to cover your desktop and set EMS to full screen. If it's not checked, you will only see the menu bar at the top of your screen, and any programs you have open in the background will still be displayed.
- Locking the EMS will bring up the logon screen. Use this option to protect confidential information while away from your desk. This does <u>not</u> log you off the system, however you must reenter your User ID and Password to return to your work. You will also be automatically locked out of the EMS after a period of time with no activity.

• Place a check next to the "Show Hints" option to access helpful hints and definitions throughout the database. If this option is checked, simply hover over any data entry field and an explanation will appear for a few seconds.



3. Program Year

When you log on, the default program year will always be set to the current program year. Each program year starts July 1 and ends June 30th. For example: Program Year 2008 goes from July 1, 2007 to June 30, 2008.

The EMS contains historical data dating back to 2002. To view data from previous program years, simply select "Program Year" on the Menu Bar. Then select the year for which you would like to view data.

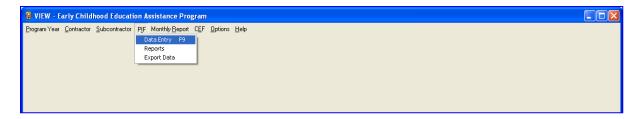


IMPORTANT: Always make sure you return to the current program year when entering data. If you inadvertently enter data in a previous year, a dialog box will appear prompting you to quit or continue.

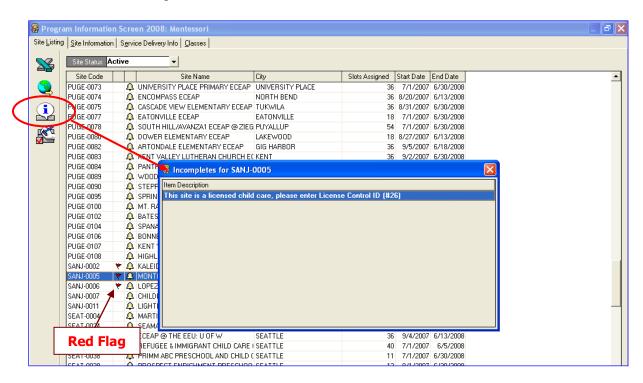
The EMS program year automatically changes each July 1. Therefore in July, when submitting Monthly Reports for June activities, you must ensure you are in the correct fiscal year.

4. Data Entry

Each section of the EMS has a Data Entry option on the drop down menu. Select this to start entering or revising your data.



All <u>yellow</u> fields in the data entry forms must be completed. Incomplete records are identified by a red flag . Click on the button on the left menu bar to find out what information is missing.



Navigation

1. Keyboard commands

Some users may prefer to use keyboard commands rather than mouse click when navigating through a page or executing commands. Following are some EMS keyboard commands.

The [Tab] key on the keyboard moves the cursor forward one field at a time. Hold down [Shift] and [Tab] to move the cursor backward one field at a time.

The Down and Right Arrow keys move the cursor forward one character at a time within a field. The Up and Left Arrow keys move the cursor backward one character at a time.



To use shortcut keys in EMS, type [alt] and the <u>underlined</u> letter in the menu bar. In the drop down menus use the function key following the command. For example: F6 for Data Entry.



2. Drop Down Menus

Drop down menus are used to choose from existing options. Click on the "▼" to view your options, or simply type in the first couple of letters and any available matches will show.



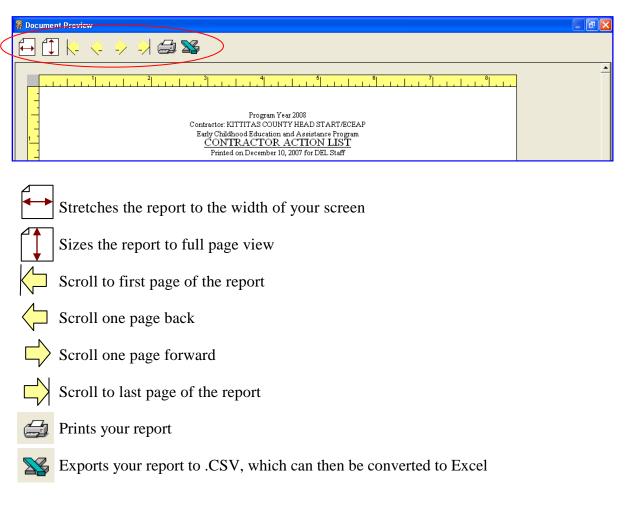
3. Calendar

Click the button to bring up an electronic calendar. Choose dates from the calendar, or type in the date manually. The calendar is handy when you need to look up a date.



4. Navigate in a Report

Reports have their own unique navigations buttons located at the top of your screen.



SECTION IV

Contractor Information

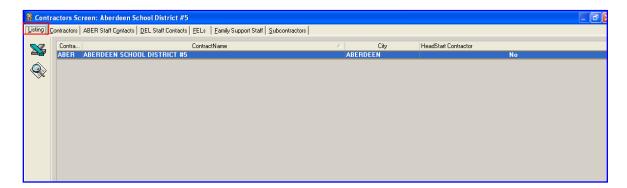
The Contractor section provides contact information for contractors and state ECEAP staff. This section is view only. Information is updated by state ECEAP staff. Contact DEL ECEAP staff at (360)725-2839 or e-mail 'ECEAP@del.wa.gov' if any of the information about your agency is inaccurate.

To view, select "Contractor" and "Data Entry" from the main menu bar.



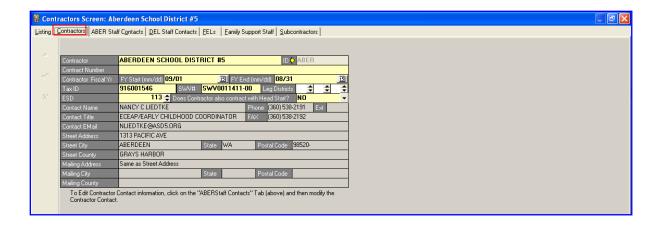
1. Listing Tab

This screen lists the four-letter contractor ID, contractor name, the city, and whether or not the contractor is also a Head Start contractor. As a contractor, you should only see your program on this screen.



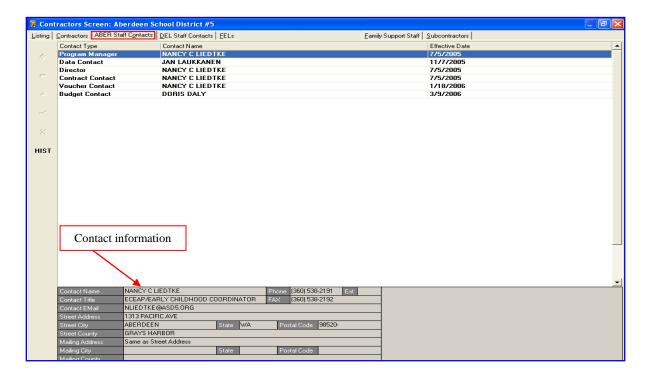
2. Contractors Tab

This screen lists the main contact information for the contractor. It also lists the ECEAP contract number, fiscal year start and end dates, Tax ID, and other important information for DEL.



3. Contractor Staff Contacts

The "Staff Contacts" screen lists the contractor's ECEAP staff and their role. To view contact information on staff listed, select their name. The information shows up at the bottom of the screen.

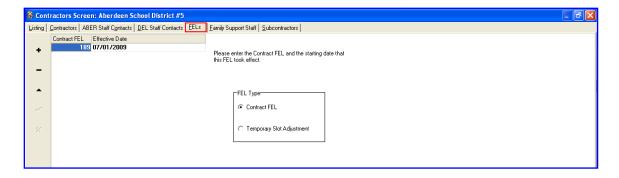


4. DEL Staff Contacts

The "DEL Staff Contacts" screen lists DEL ECEAP staff and their roles. To view contact information about DEL staff, click on their name. The information is displayed at the bottom of the screen.

5. FEL's

This screen lists the contractor's Funded Enrollment Level (FEL) and slot adjustments (if any).

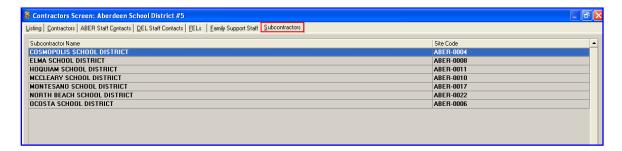


6. Family Support Staff

This tab is currently not being used.

7. Subcontractors

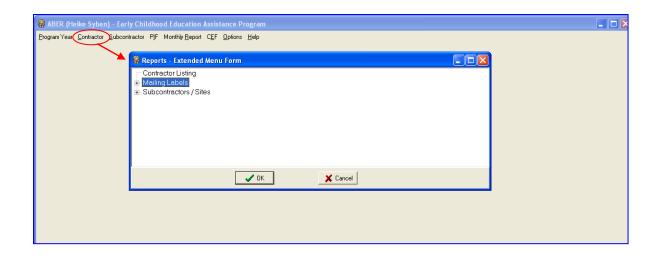
The subcontractors for each site are listed here. This information comes from field #22 on the site information tab (Page 15) on the Program Information Form (PIF) data entry screen. If the information is inaccurate, please check the data that was entered in the PIF.



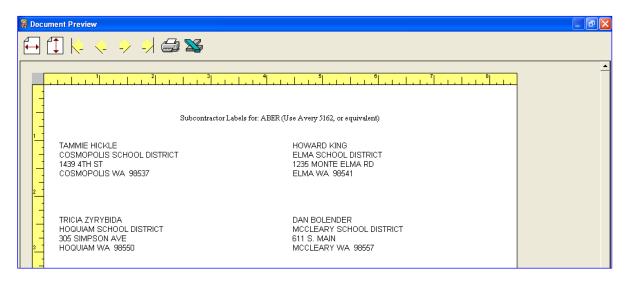
8. Reports

The Reports section under the Contractor tab allows you to view and print mailing labels for ECEAP staff and your subcontractors.

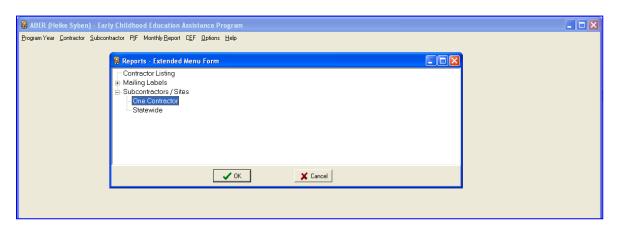


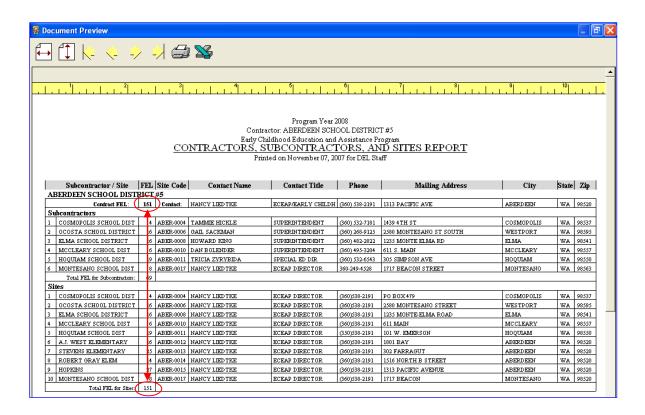


The labels are formatted to print on Avery 5162 address labels or equivalent size.



The Subcontractors/Sites option provides a listing of all your subcontractors, sites, contact names, and their addresses and phone numbers in one convenient document.





This report also lists your contracted Funded Enrollment Level, and the number of slots assigned to each site. Please note that the total FELs for your sites should always equal the contracted FEL (see graphic above).

SECTION V

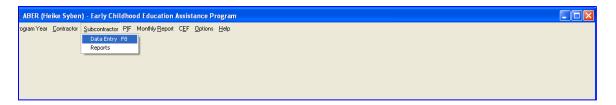
Subcontractor Information

1. Subcontractor Listing

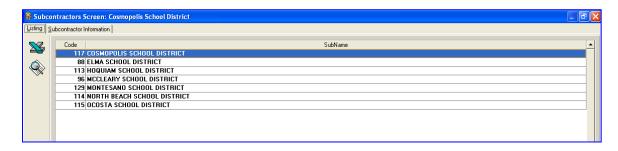
If you subcontract ECEAP services to other entities, their contact information must be entered into the Subcontractor tab. The subcontractor name will then also appear under the Contractor/Subcontractor tab (see previous section, #9.)

2. Data Entry

To edit the information about your subcontractors, click on the "Subcontractor" tab and then "Data Entry."

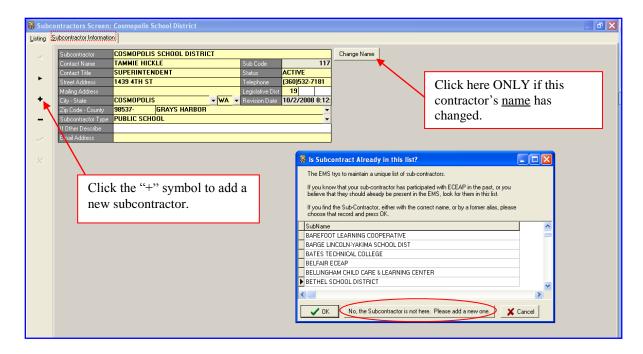


This brings up the "Listing" screen which lists each subcontractor entered for your program.



To view subcontractor information, click the name and then the "Subcontractor Information" tab (see graphic on next page). This is where you make changes, add or delete subcontractors.

If you want to add a new subcontractor to your list, click the "+" on the left-hand side of the screen. A dialog box will come up with a list of all subcontractors previously entered into the EMS for the whole state. Search for the name of your subcontractor and click "ok." If the name does not appear on the list, select the middle button "No, the Subcontractor is not here. Please add a new one." This will bring up a new data entry form. When finished entering the information, save it by clicking the "\sqrt{"}" symbol.



Click the "-" symbol on the left-hand side of the screen if you want to delete a record. This will delete the selected subcontractor and all their contact information from the database.

IMPORTANT: In order to change the <u>name</u> of a subcontractor already listed, click the "Change Name" button. This button is only used if the subcontractor changed its name. It cannot be used to enter a different subcontractor.

Type any other changes to the contact information directly into the yellow fields. Then click the " \checkmark " to post the changes.

Click ◀ or ▶ to scroll through your subcontractors.

SECTION VI

Program Information Form (PIF)

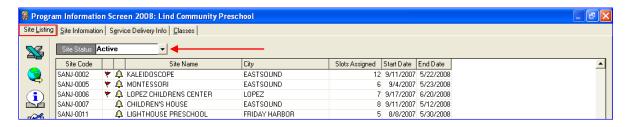
1. Data Entry

The Program Information Form (PIF) provides site, service delivery, and individual class information for each location. It is important to ensure that this data is updated each program year. At the beginning of each program year, Program Information Forms automatically carry forward from the previous year. Review all records and enter any updates or changes as needed.

As in previous menus, in order to begin data entry, select PIF and Data Entry from the menu bar. This will bring you to the Site Listing screen.

2. Site Listing Screen

This screen lists all of your program's active sites. To see all your inactive sites, select "Inactive" from the drop down menu next to "Site Status." Incomplete records are identified by a red flag . Click on the button on the left menu bar to find out what information is missing.



All data on the PIF must be completed and accurate before you can begin entering your Monthly Report forms into the EMS.

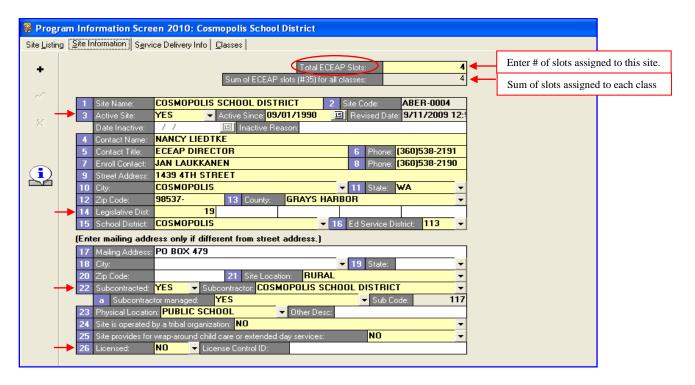
To enter a new site, click on the Site Information tab and then the "+" symbol at the left of the screen. To change your site information, highlight the site you wish to update, and then click the Site Information Tab.

3. Site Information Screen

The site information tab contains location and general site information. Pay special note to the following fields:

Total ECEAP Slots

This is where you enter the number of slots assigned to this site. The gray field below is calculated from the number of slots you assigned to each of your classes at this site. These two numbers <u>must</u> be equal. See Number 7 on Page 17 for instructions on how to assign slots to your classes.



#3 – Active Site

The Active Site field should be set to "Yes". If the site becomes inactive, select "No" from the drop down menu to change the status from "Active" to "Inactive". This will remove it from your Active Site listing. Enter the date and reason the site became inactive.

#14 – Legislative District

The Legislative District line has one required field and four optional ones. This is for sites serving in more than one district. Enter all legislative districts applicable to your site.

#22 – Subcontracted

Set field to "Yes" if this is a subcontracted site. Complete the next two required fields.

#26 – Licensed

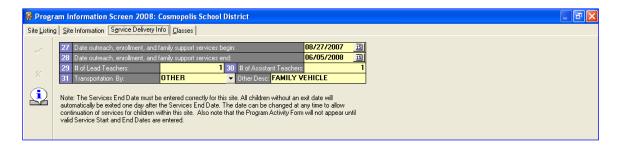
If the site is a licensed child care center, select "yes". You must enter the license control ID to complete the record.

Remember to click the "\sqrt{"}" symbol to post your changes.

4. Service Delivery Information

The Service Delivery tab lists:

- Services Start Date When this site starts operations (including outreach, enrollment, and family support). The earliest date you can enter is July 1 of this program year.
- Services End Date When this site ends operations
- Number of Lead Teachers
- Number of Assistant Teachers
- Transportation



Important Things to remember about this screen:

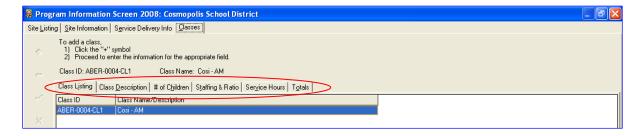
The Services Start Date (#27) tells EMS when to expect a Monthly Report. This is <u>not</u> the same as the Class Start Date (the first day classes begin).

Children without an exit date are automatically exited on the day after the Services End Date.

5. Classes Tab

Enter individual class information under this tab. The following tabs are listed on the "Classes" screen:

- Class Listing
- Class Description
- # of Children
- Staffing and Ratio
- Service Hours
- Totals



6. Class Description

To add a class, click the "+" symbol on the left side of the screen. Start entering information under the Class Description Tab.

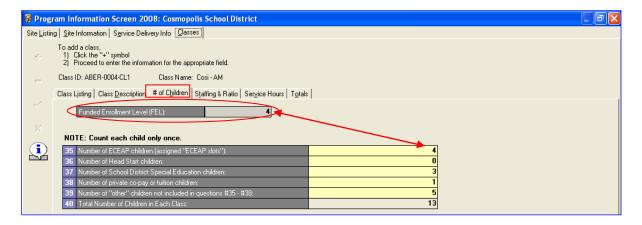


Note: The class start dates (#32) should begin on or after the services start date (#27 on the Service Delivery Info tab). The class end dates (#33) should end before or on the same day as the services end date (#28 on the Service Delivery Info tab).

7. Number of Children

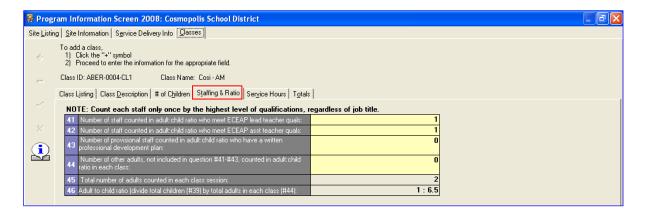
Enter the number of children in the yellow fields. Each child can only be counted once. If they are enrolled in ECEAP, count them as ECEAP children even if there are additional funding sources. If there are children in the class who are not enrolled in ECEAP, list them according to their primary funding source. The gray field (#40) automatically calculates the total based on the information you provide in #35 – #39.

The Funded Enrollment level entered for this site on the Site Information tab is located in the middle of the screen, and must match the <u>sum of ECEAP</u> children listed for each class.



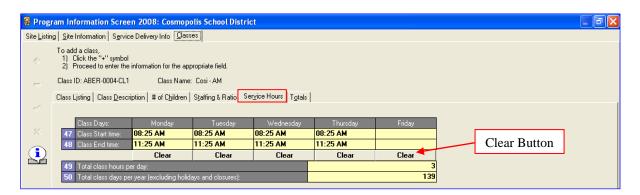
8. Staffing and Ratio

Complete the yellow fields on the staffing and ratio screen. The gray fields are automatically calculated.



9. Service Hours Screen

Enter the scheduled times and days classes are in session, and total number of class <u>hours</u> <u>per day</u>. Then enter the number of class <u>days per year</u>, excluding holidays, vacations, and other closures.



To delete or change your class times, click on the "Clear" button below each day.

10. Totals

The Totals screen automatically calculates the total preschool hours for the year. This number should be equal or greater than the minimum hours required by ECEAP Performance Standard E-1.



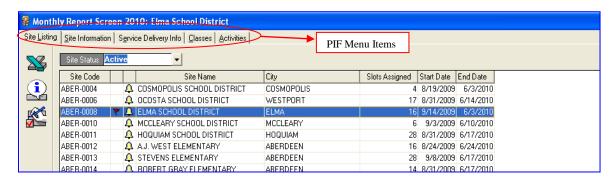
SECTION VII

Monthly Report Form

The Monthly Report Form section of the EMS must be completed each month before a payment voucher can be submitted. This is where you enter your activities for each class and site for the month. On the EMS main menu bar, select Monthly Report, then Data Entry.

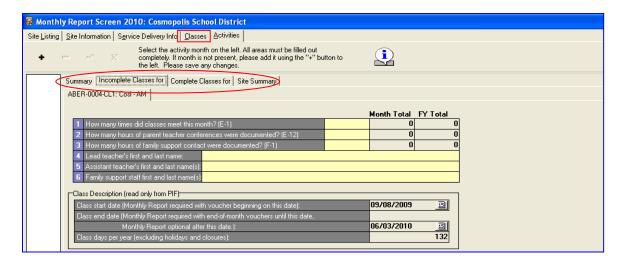
1. Activities Screen

The same menu items from the PIF screen are also accessible under the Monthly Report tab (see below), with one additional tab titled "Activities". On the "Site Listing" Screen, select the site for which you want to enter data, then select the "Activities" tab.



There are 4 tabs on the Activities screen:

- Summary
- Incomplete Classes for (Month & Year)
- Complete Classes for (Month & Year)
- Site Summary

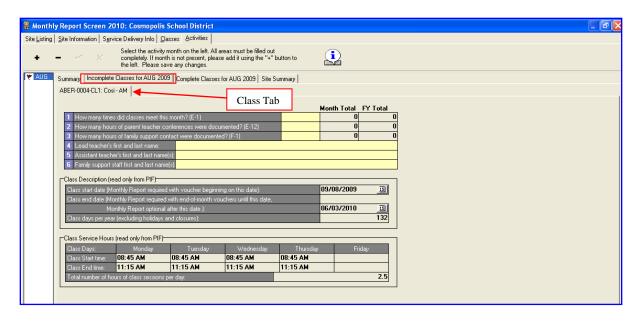


2. Data Entry

To enter data, click the "+" button on the top left of the screen. A dialog box will appear. Select the correct month from the dialog box and click "OK".



The selected month will appear in the left column with a red flag next to it. Red flags indicate months that have incomplete Monthly Report Forms. Select the "Incomplete Classes" tab. If there are no incomplete classes, this screen will be blank.



Each class has a tab under the "Incomplete/Complete Classes" screens. Enter monthly activity data for each class in the yellow fields. Once you've entered the staff names, they will roll forward to the next month. <u>Update these</u> if they have changed from the previous month. The gray fields are posted for your information; any changes to these fields must be made under the "Service Delivery Info" tab.

IMPORTANT: You must complete a Monthly Report Form for every month you bill. For items that did not occur that month, enter "0".

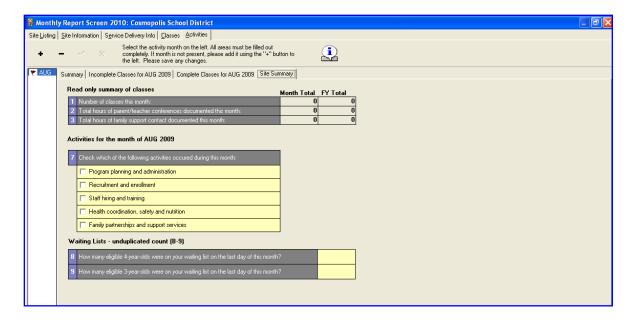
Remember to click the "✓" to save the record.

3. Complete Classes

Once the records for each class are complete, they will appear under the "Complete Classes" tab for the selected month, and the red flag in the left column will disappear.

4. Site Summary

Complete the Site Summary section of the Monthly Report Form, entering information for the entire site.



Complete all the yellow fields. Enter "0" if there is nothing to enter. Otherwise it will show up as an incomplete record.

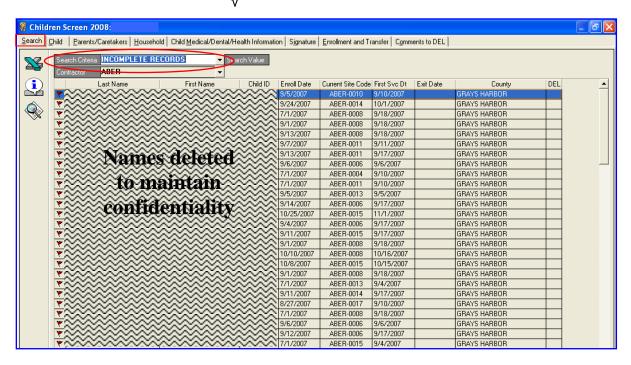
SECTION VIII

Child Enrollment Form (CEF)

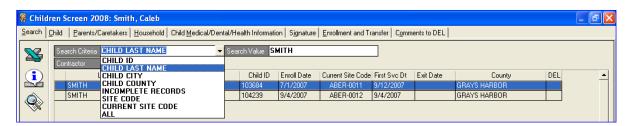
The Child Enrollment Form (CEF) section is where all information regarding the child and family is entered.

1. The Search Tab

Select the CEF tab, then Data Entry. Under the "Search" tab, the Search Criteria defaults to "INCOMPLETE RECORDS". Only your incomplete records will appear under this criteria. Select a record, and click on the incomplete table to button to find out what information is missing.

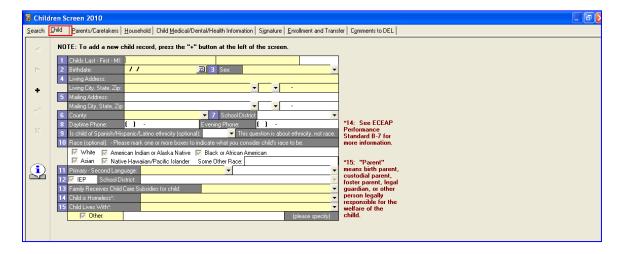


You can change the search criteria to Child ID, Last Name, City, County, and Site Code. Select "All" to pull up all children entered into the EMS system for your program.



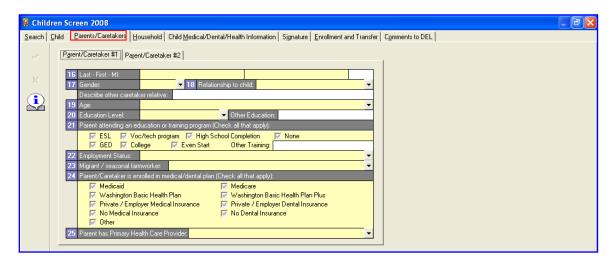
2. Child Tab and Adding a New Record

To add records to the Child Enrollment section of the EMS database, select the "Child" Tab and click the "+" on the left side of the screen to insert a record. The data entry form will turn blank and you will be ready to add a child.



3. Parent/Caretaker Tab

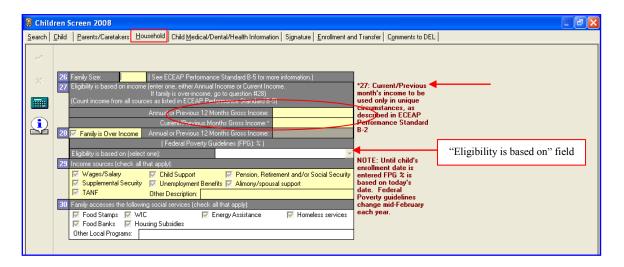
Enter parent information on these screens. If you selected Child Resides with "Single Parent with Legal Responsibilities for Child" in #15 above, then only one Parent/Caretaker screen will appear.



4. Household Tab

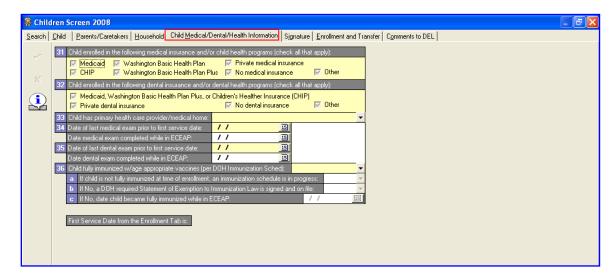
Annual Income or Monthly Income Choice

You can select which income better reflects the family's current situation. See ECEAP Performance Standard B-2. The system will use that figure to calculate the income. When a family's income is over 110% of the Federal Poverty Level, a check will be automatically entered into the "Family Over Income" check box. IMPORTANT: When a family is over-income, you <u>must</u> enter the risk factors defined under Standard B-4 in the "Eligibility is based on" field.



5. Child Medical/Dental/Health Information Tab

Enter the medical, dental, and immunization information for each child. You must update the medical exam, dental screening, and immunization dates as children complete them.



6. Signature Tab

Click the check boxes once signatures and income have been verified, and eligibility established.



7. Enrollment and Transfer Screen

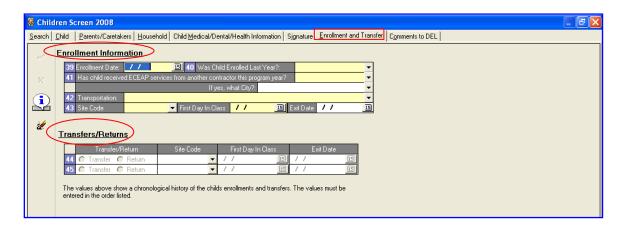
Under "Enrollment Information", enter the date the child was officially enrolled in ECEAP. This should be the date eligibility was verified. Select whether the child was enrolled the previous year. If the child has moved from another contractor, list what city.

Select the transportation method, site code, and the child's first day in class. If a child exits the program early, enter the exit date. Otherwise, EMS automatically exits the child the day after the last day of class.

To report a child that Transfers between sites:

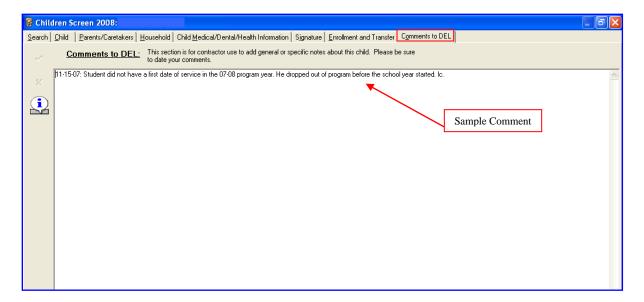
Enter the date child exited from the previous site. Click the "Transfer" button. Enter the NEW site code. Enter the First Service date at new site. If child exits ECEAP, enter exit date for the last site the child attended.

To report a child that has exited ECEAP and Returns to the same program: Enter the date child exited. Click the "Return" button. Then enter the site code and return first service date.



8. Comments to DEL

Use this screen to write notes about individual records for your own information, and to provide explanations to DEL staff when needed.



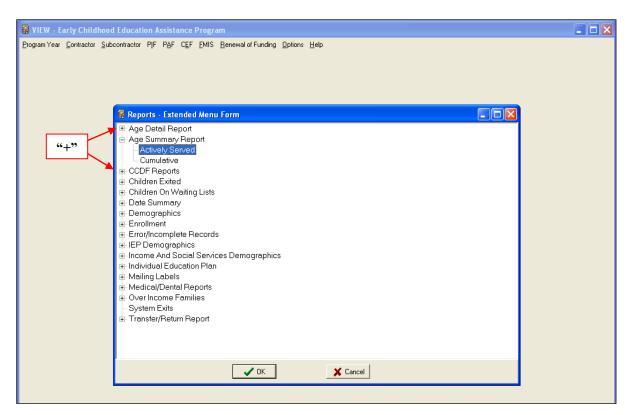
SECTION IX

CEF Reports

The Child Enrollment Reports aggregate data that has been entered in the Child Enrollment screens. These reports include ages of children, # of over-income families, enrollment numbers, medical and dental completion rates, and more. State ECEAP staff and contractors use these reports to monitor program compliance with ECEAP Performance Standards and check the completion of data.

1. List of Reports

From the EMS main menu, select "CEF" and then "Reports" to bring up a menu of available reports.



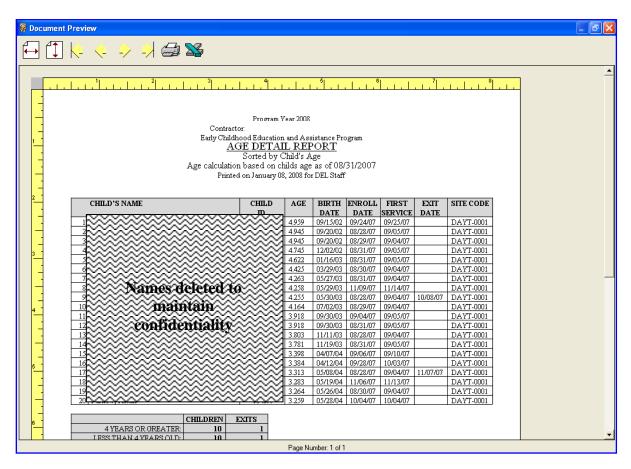
To select a report, double click on the name, or highlight the name and click "OK". A "+" next to the name indicates there are sub-menu items (see above). Either click on the "+", or double click the menu item, to reveal the sub-menu items.

2. Actively Served vs. Cumulative

Several menu items provide a choice between "Actively Served" and "Cumulative" data. Actively served data is based on children currently enrolled. Children that have exited the program are not included. Cumulative data adds in all child enrollment forms, including exited children.

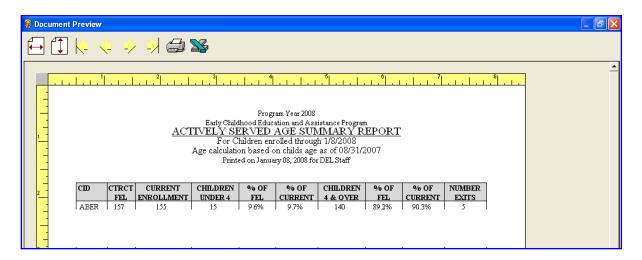
3. Age Detail Report

The Age Detail Report lists all children enrolled, their age on August 31st of the current school year, birth date, and enrollment dates. Use this report to see how many 3- and 4-year-olds are enrolled, and to make sure all children are age eligible. Sort the report by child's name or child's age.



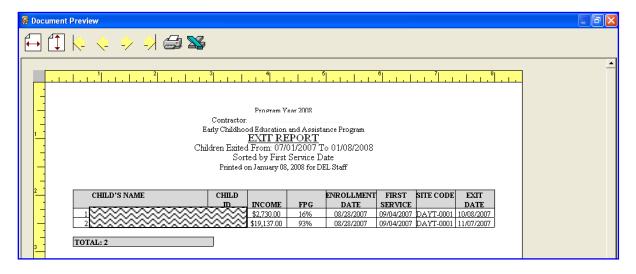
4. Age Summary Report

This report summarizes the number of 3- and 4- year olds enrolled in your program. It also calculates the percentages of each based on your contracted FEL and your current enrollment.



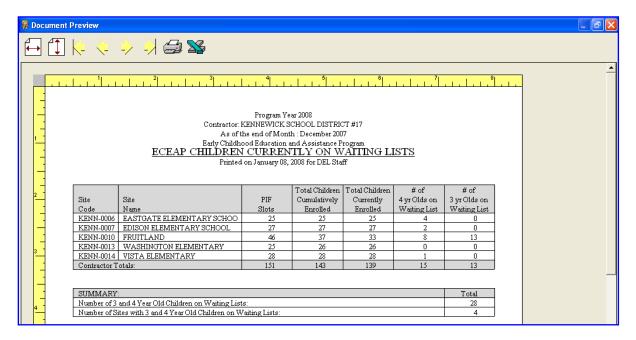
5. Children Exited

This report lists the children that have exited from your program, their income and percent of the Federal Poverty Guidelines (FPG).



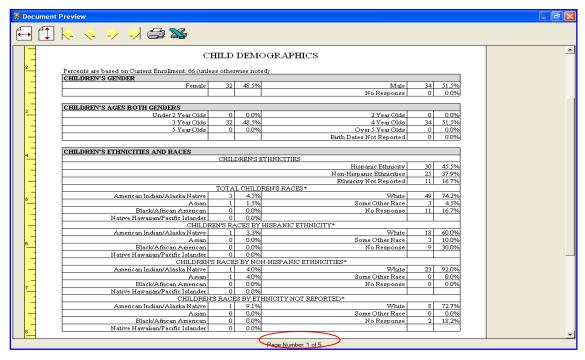
6. Children on Waiting Lists

This report shows the number of 3- and 4- year olds on waiting lists for each site.



7. Demographics

The Demographics report is a comprehensive summation of all data entered into the child enrollment forms for your program. Note there are five pages of demographics.

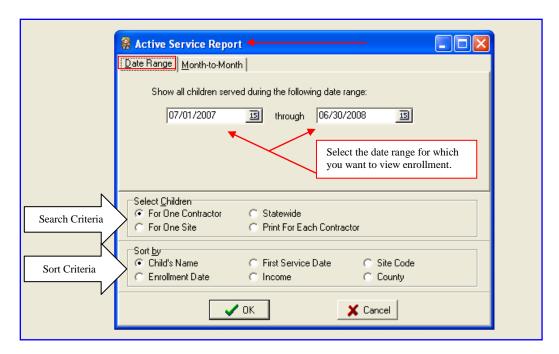


8. Enrollment

Enrollment reports can be accessed using several criteria.

Date Range:

Select the "Date Range" tab to show all children enrolled within the specified time frame. The default date range is from July 1 through June 30. This will list everything for the current program year up to the date of the report. Note: The enrollment reports can be based on Actively Served and Cumulative children. The example below is the Active Service Report.



Select the search criteria:

- For One Contractor lists all children enrolled under your contract.
- For One Site choose the site for which you want to view enrollment.
- Statewide compare your enrollment numbers to other contractors.

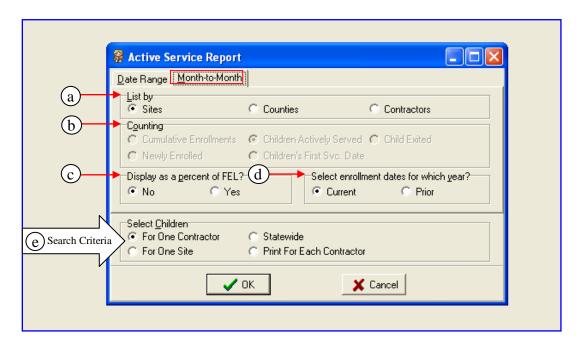
Select the sort criteria:

- Child's name sorts by children's last name.
- Enrollment Date sorts by the date children are enrolled (not the first day in class).
- First Service Date sorts by the first day children start attending classes.
- Site Code Sorts by each site.
- Income Sorts by family's income level.
- County Sorts by county, if contractor serves more than one county.

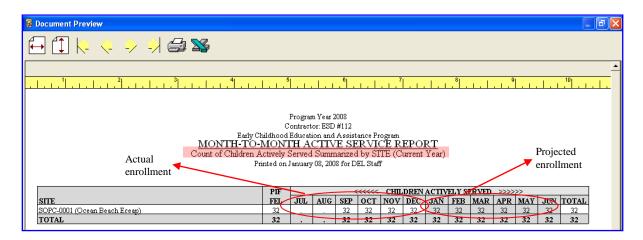
Month-to-Month

Compare monthly enrollment levels under the "Month-to-Month" tab:

- a) List the data by Sites, Counties, or by your program (Contractors).
- b) The "Counting" options are not available and are grayed out.
- c) Select if you want the enrollment data listed as actual numbers, or a percentage of the FEL. Contractors are required to be 100% enrolled within the first 30 days after classes start, and must maintain an enrollment level of 95% throughout the year.
- d) You can also select enrollment levels from prior years under this tab.
- e) Finally, select your search criteria.



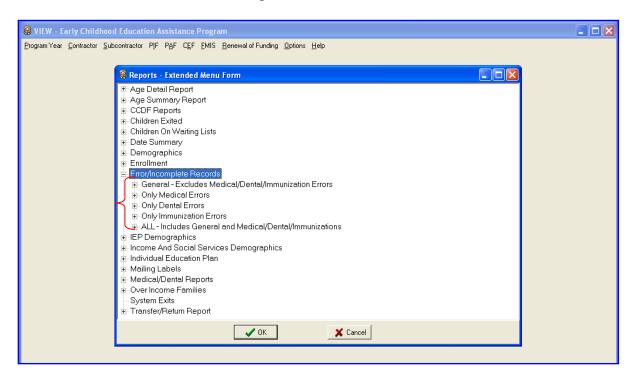
This report shows the count of actively served children for one site. The grayed out months list future projections which are based on the last completed month. The white fields are based on the actual enrollment numbers for that month.



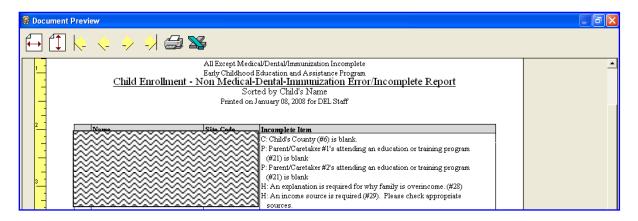
9. Error/Incomplete Records

Track all of your errors and incomplete records in this one report. Incomplete medical and dental exams can also be listed separately. There are five filters for listing errors and incomplete records:

- General Excluding Medical/Dental/Immunizations
- Only Incomplete Medicals
- Only Incomplete Dentals
- Only Incomplete Immunizations
- ALL Errors and Incomplete Records



Each Error/Incomplete report lists the child's name, site code, and a description of the errors or incomplete items for that child's record, including the question number on the CEF.

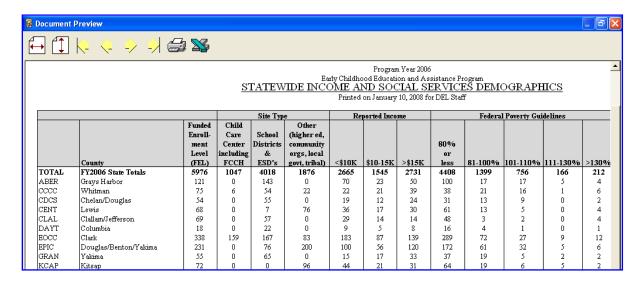


10. IEP Demographics

This report lists all the demographics for children enrolled with Individual Education Plans. The report has all the same fields as the "Demographics" report, but is filtered to only count children on IEPs.

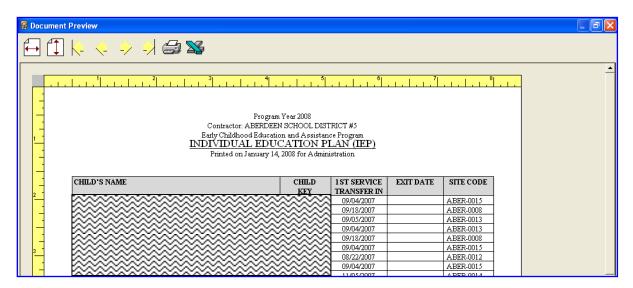
11. Income and Social Service Demographics

This report tallies the income and social service data of enrolled families, and sorts them by contractor.



12. Individual Education Plans

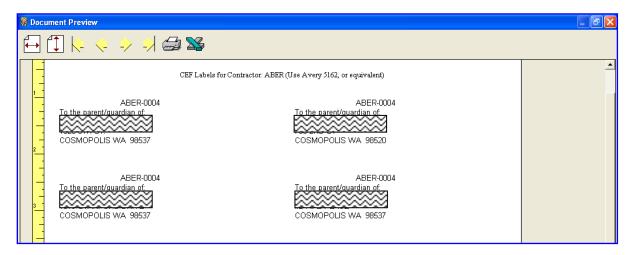
This report lists all children in your program who are on an IEP.



EMS SECTION IX CEF Reports

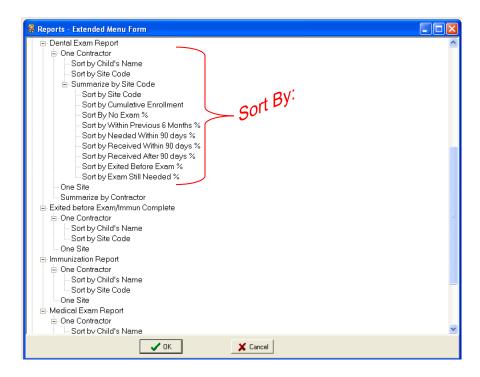
13. Mailing Labels

Print mailing labels for all your enrolled families using this report.



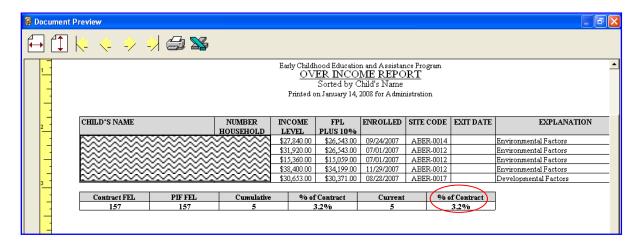
14. Medical and Dental Exam Reports

These reports look specifically at your medical and dental exam completion percentages. Choose how you would like the records sorted, then click "OK".



15. Over Income Report

Use this report to list all over-income children for your program. The report also calculates the percentage of over-income children based on your cumulative and active enrollments. The maximum over-income percentage in state statute is 10%. Refer to ECEAP Performance Standard B-4 to find out your maximum percentage.



16. Transfer and Return Report

This report tracks your children as they enter and exit a program. It's an easy way to identify which children transferred from one site to another.

